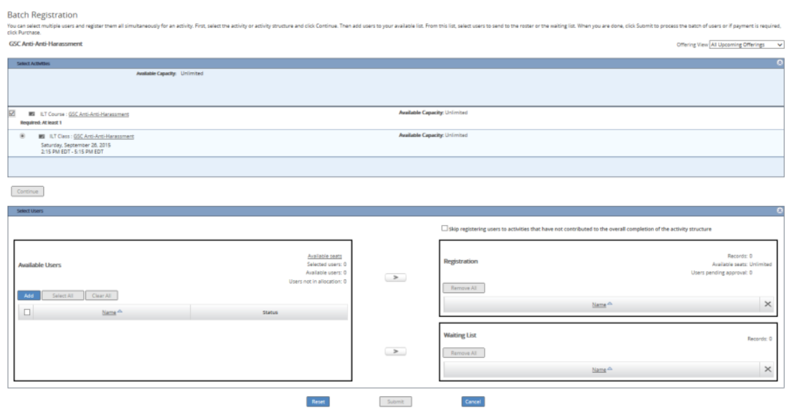
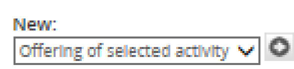
KELMS Quick Reference Sheet For Instructors

To Register Employees for a Class

1. Search for the Activity using the search field or the catalog. You can search for ALL activities in the search. By default your catalog on your Learner Dashboard is your Domain's catalog. You can see the categories created by your domain. To see the Global Catalog hover over Learner→Learn →(click on)Catalog.
2. When you find the class, hover over actions.
3. Select "Register Others."
4. Use the radio button to select the class that you would like them to attend. (Pay attention to the Available Capacity.)
5. Select the blue **continue** button and scroll down.
6. In the "Available Users" box, click the blue Add button.
7. Select how you want to search for the individuals: by organization, all viewable users, etc.
8. Click on the top arrow in the middle to move your selected available users to registration; Click on the bottom arrow to move them to the wait list if the class is full. **(Pay attention to the selected users in the Available Users box. Make sure you don't have too many people selected.)**
9. **Click on the Submit button**. **DONE!** (You should be cc:ed on the registration confirmation for everyone you enroll.)



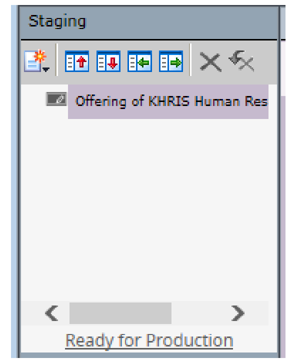
To Create a Scheduled ILT Class from an ILT Course (Use this to create a class ahead of time or after you receive a sign in sheet.)

1. Hover over **Administrator→Learn→(click on)Learning Activities**
2. Change the Activity Type drop down to ILT Course (This will give you a list of all the Course Codes/Names that your domain has created.)
3. Find the ILT Course Template you want to make an ILT Class from. (You may want to use the search, or advanced search to narrow your choices.)
4. Click on the radio button  to the left of the ILT Course name.
5. Click on the little arrow (go button) to the right of "Offering of selected activity." 

6. DO NOT Click on the calendar here (unless creating a multi -day training). Enter the **duration** and the **capacity** of the training.
7. Click on the **Build Offering** button.
8. Click on "Switch to Advanced" view. The following is a list of properties you MUST change. You may want to change additional properties if you are scheduling the event in advance. (See Additional Note at the end of this procedure if you are creating classes that will be registered for through the catalog.)

a. Under the **Properties** Category you will need to change:
   i. **General →** Take out the words "offering of" and make any changes to the name you need to make.
   ii. **Status→** Check "Can Be Copied" (If you want to make copies of the ILT Class later.)
   iii. **Grading and Completion→** Estimated Duration and Estimated Credit Hours

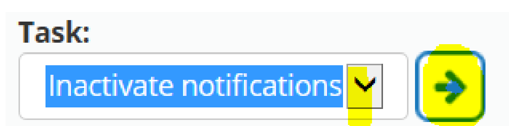
b. Under the **Schedule** Category you will need to change:
   i. **General →** Start Date and Time, End Date and Time



c. Under the **Resources** Category you will need to change:
   i. **Instructors →** Click the Add button. This will pull up a new window. Search for your instructors in the new window and add them to the training. (If Applicable)
   ii. **Locations →** Click the Add button. This will pull up a new window. Search for the correct location of your training. **(Important for both reporting purposes and to help provide users with instructions on locating the facility.)**

d. Under the **Notifications→System,** in the top right hand corner change the VIEW to **ACTIVE** (to see all the active notifications attached to this activity). This is where you can turn the notifications **OFF** for an activity that has already taken place so that the learners do not receive a notification for an activity they have already finished.
   A. Click the box to the left of Notification Name (to select all Active Notifications). This will place a check in the box for all active notifications.

   B. Now that all boxes are checked and ready for inactivation, Click the TASK drop down window and change it to Inactivate Notifications. Click Go.



There should be NO Active Notifications attached to this activity now.

9. Click on the **Ready for Production** link in the Staging window on the left. (see picture on right.)
10. Click on the blue **"Move to Production"** button in the main window.
11. Scroll to the top:
    a. If you are entering training after the training has taken place (you have the sign in sheet) click on the blue "Go to Activity Roster." Go to pg. 4 of this guide, "Managing a Roster" to add people.
    b. If you are scheduling an upcoming training click on the blue "OK" button.

NOTE: ADDITIONAL PROPERTIES FOR THOSE SCHEDULING CLASSES IN ADVANCE

a. **Under the Properties Category:**
   i. **Notes→** User Notes and Registration Instructions both need to be filled in. This information gets sent in the registration notifications. You can add links and other information that you need to include in the registration notification here.

b. **Under the Schedule Category:**
   i. **General→** You can select Cancellation and Registration Deadlines.

c. **Under the Registrations Category:**
   i. **Availability→** In addition to the capacity, you can add a minimum capacity, or an approver for the training.
   ii. **Audiences→** If you only want to allow certain individuals access to register, have your training coordinator create a special audience for you.
   iii. **Allocations→** If you want to hold seats for a specific audience. You can hold seats for only a period of time, or until the class occurs.
   iv. **Prerequisites→** These should be set up at the ILT COURSE level by your Training Coordinator
   v. **Evaluations →** If you want to include an online evaluation instead of using paper

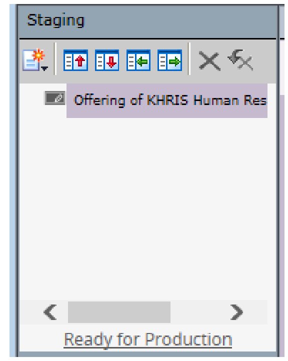
d. **Any other Categories→ Ask your Training Coordinator about.**

To Make a Copy of an Existing ILT Class (Use this to quickly create a copy of a recurring training that is offered.)

1. Hover over **Administrator→Learn→(click on)Learning Activities**
2. Change the Activity Type drop down to ILT Class (This will give you a list of all the ILT Classes that your domain has created.)
3. Find the ILT Class that you want to make a copy of. (You may want to use the search, or advanced search to narrow your choices. If you created the old ILT Class use the Advanced Search, and put your last name in the "Owner" field to limit the number of activities you see.)
4. Click on the radio button to the left of the ILT Class name.
5. Click on the blue Copy button Copy .
6. Choose how you want to offset the new class's properties. You can offset by a specific # of days (the second radio button), or by a specific date (the third radio button.)
7. Select the number of copies you want to make. (Leave blank for 1 copy.)
8. Click on the blue OK button.
   NOTE: If you make multiple copies, you will be taken back to the **Learning Activities** page that will show you a list of only your newly created copies. You will need to click on the Edit Pencil next to the name of each created copy to bring them into the **Learning Activities Properties** page.
9. In the **Learning Activities Properties** page, click on General Properties.
10. Delete "Copy of" from the start of the name, and make any additional changes to the name here.

Step 11 is Optional

11. **Make any additional changes to the new class's properties that need to be changed, i.e. capacity, location, etc. (If no other changes are needed, go to step 12. If you need to change some of the more advanced properties, click on "Switch to Advanced View" to see the additional properties.)**
12. Click on the **Ready for Production** link in the Staging window on the left. (see picture on right.)
13. Click on the blue **"Move to Production"** button in the main window.
14. Click on the **OK** button.
15. **IF you made multiple copies, you will be returned to the Learning Activities page which will only show your newly created copies. If you want to edit your additional copies at this time, click on the pencil next to your next copy and repeat Steps 9-14.**



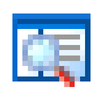
Managing a Roster (You should only manage the rosters for classes you are responsible for. You may be responsible for the training if you get the sign in sheet and you are entering training after the fact, you are the instructor for the class, or you are an instructor/training coordinator responsible for marking completions on a roster after training takes place.)

Find your class roster in 1 of 3 ways:

A. Immediately after creating the class click on the blue **"Go to Activity Roster"** button

B. From the Learning Activity Page, Select the **"Manage Roster"** Icon next to the name of the ILT CLASS you are managing.(MAKE SURE that it is the ILT CLASS and not the ILT Course)

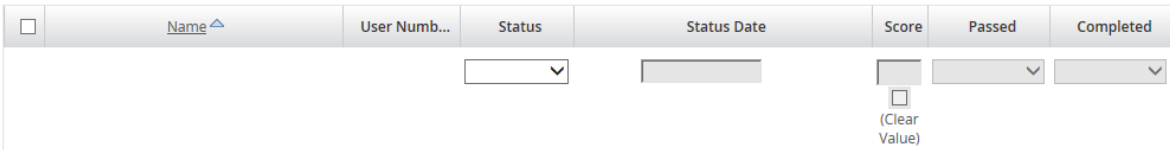
C. If you are the instructor and listed as responsible, you can hover over **Learner→Learn→Instructor Schedule,** find the training and click on the **"View Activity Roster"** Icon.



To add people to the Roster, click on the Add Button

1. Select the blue **continue** button and scroll down.
2. In the "Available Users" box, click the blue **Add** button.
3. Select how you would like to search for the individuals you are registering: by organization, all viewable users, etc.
4. Once you have you're the people you would like to register in the Available Users Box, click on the top arrow in the middle to move them to registration; The bottom arrow to move them to the wait list if the class is full. **(Pay attention to the selected users in the Available Users box and make sure you don't have too many people selected.)**
5. **Click on the Submit button**. **DONE!** (You should be cc:ed on the registration confirmation for everyone you enroll.)

To Manipulate the Roster



1. Select the individuals that you want to make changes to by clicking on the checkbox next to all appropriate names (If you are changing ALL users' statuses to the same status, you don't need to select everyone's checkbox. You would select the "Apply to All" button after steps 2-4.)
2. Change Status to appropriate status (Attended, cancelled, etc.)
3. If marking as attended, also select "YES" for completed.
4. If you have tests related to the training, enter their Score and Passed statuses.
5. Click "Apply" or "Apply to All" ("Apply to ALL "CHANGES EVERYONE ON THE ROSTER TO MATCH THE SETTINGS THAT YOU HAVE FILLED IN FOR EACH COLUMN ABOVE.)

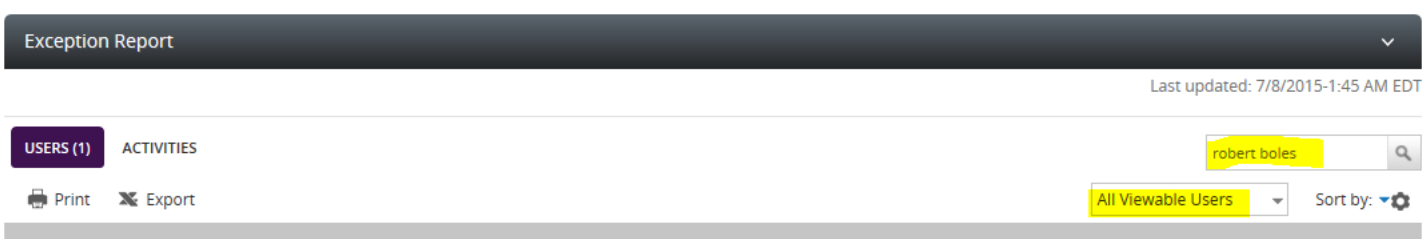
NOTE: If you make a mistake or need to make a change, simply click on the checkbox next to those individuals you need to manipulate the status of, make the change in the appropriate fields above and click "Apply."

To Move a Learner from Wait List to Register Status

1. Go to Administrator→Learn→Learning Activities
2. In the Search box, Enter the name of the class in which your learner is Wait Listed (don't forget to fine tune your search by Selecting the Activity Type on the right hand side of the screen)
3. From the Learning Activity Page, Select the **"Manage Roster"** Icon next to the name of the ILT CLASS you are managing.(MAKE SURE that it is the ILT CLASS and not the ILT Course)
4. Change your view in the top right hand corner (from completion information to waiting list)
5. Check the box beside the name of the person you want to Register (enroll)
6. Click Move to Roster

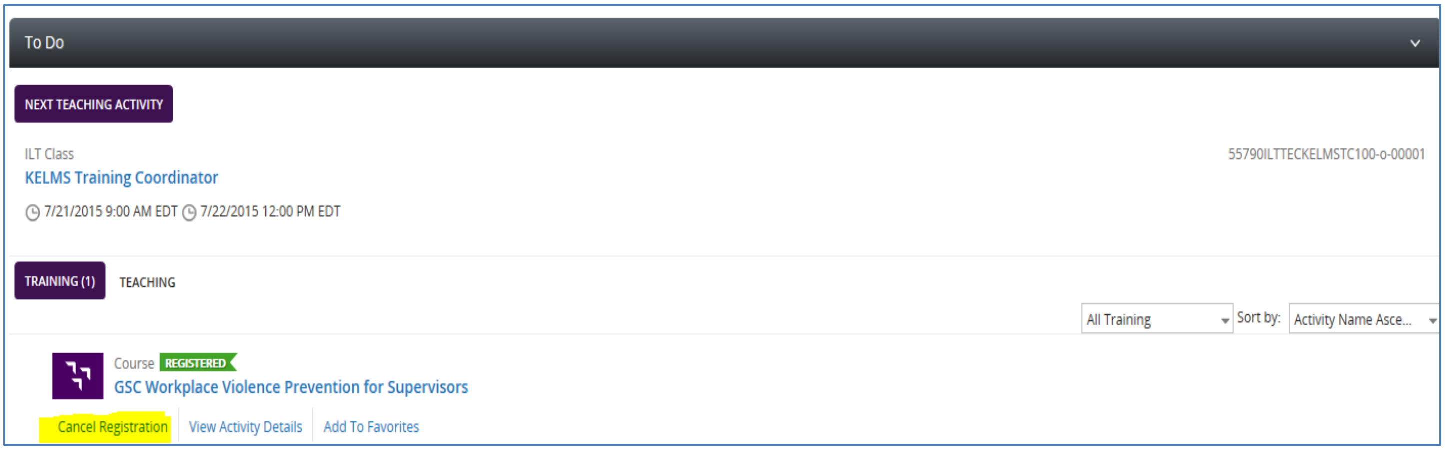
Cancelling a Learner from a Class

1. Hover over Manager and click on Dashboard.
2. Change the Drop down on the right hand side from "Direct Reports" to "All Viewable Users."
3. Use the "User Search" field directly above that to search for the employee's name.



4. Hover over "Actions" on the employee's tile and select "Employee View."
   NOTE: This will change your manager screen to a copy of the employee's view. You will need to change it back after cancelling the learner.

5. Click the CANCEL REGISTRATION link under the class you would like to cancel the person from.



6. Click on the drop down caret to the right of the Login in the top right (It should have your name and then the person's name you are cancelling in parenthesis.)
7. Select, "Switch to Workgroup View."
8. Return to whatever you needed to do! You and the person you cancelled should receive a cancellation notice.

To Review Another Person's Transcript/Diploma

1. Hover over Manager and click on Dashboard.
2. Change the field in the main frame from "Direct Reports" to "All Viewable Users."
3. Use the Search field directly above that to find a specific user.
4. Once you have found the user's tile, hover over Actions and click on "Transcript."
5. To view the certificate/diploma click on the little diploma icon next to any completed training. This should pull up the Certificate.

To Review Your Transcript/Diploma

1. Go to Learner→Learn→Training Activity Reports→(click on)Training Transcript.
2. To view the certificate/diploma click on the little diploma icon next to any completed training. This should pull up the Certificate. Have a great day!

To View a Learner's Activities

1. Go to Administrator→Manage→Users→List Users
2. In the Search box, enter the name of the person in which you wish to look up.

3. Click on the learner name.
4. In the Summary box to the left, click on Learning Activities
5. In the View box on the right side of the screen select the choice that suits your needs:
    - **a.** Upcoming Activities
    - **b.** Completed Activities
    - **c.** Cancelled Activities
    - **d.** Current Activities

To Add One Time Activities To A Learner Transcript

You must emulate the learner to do this.

1. Hover over **Manager→Dashboard**
2. In the top right hand corner, locate your name and click the drop down arrow
3. Click WORKGROUP- CHANGE VIEW
4. Search for the Learner name for which you wish to add training
5. Select the radio button beside the learner name and Click OK

To add the training activity to the Learners Transcript:

6. Hover over **Manager→Learn→Self-Reported Training**
7. Click NEW to add the first activity
    - a. Name (Required): Enter name of Activity
    - b. Code: Self-Reported
    - c. Description: Something that identifies this activity
    - d. Activity Type (Required) : ILT Class (unless you specify differently)
    - e. Start Date & Time
    - f. End Date & Time
    - g. Duration: (Enter hours)
    - h. Credit hours: (Enter hours)
    - i. CLICK OK to save your information

To View the Learner Transcript

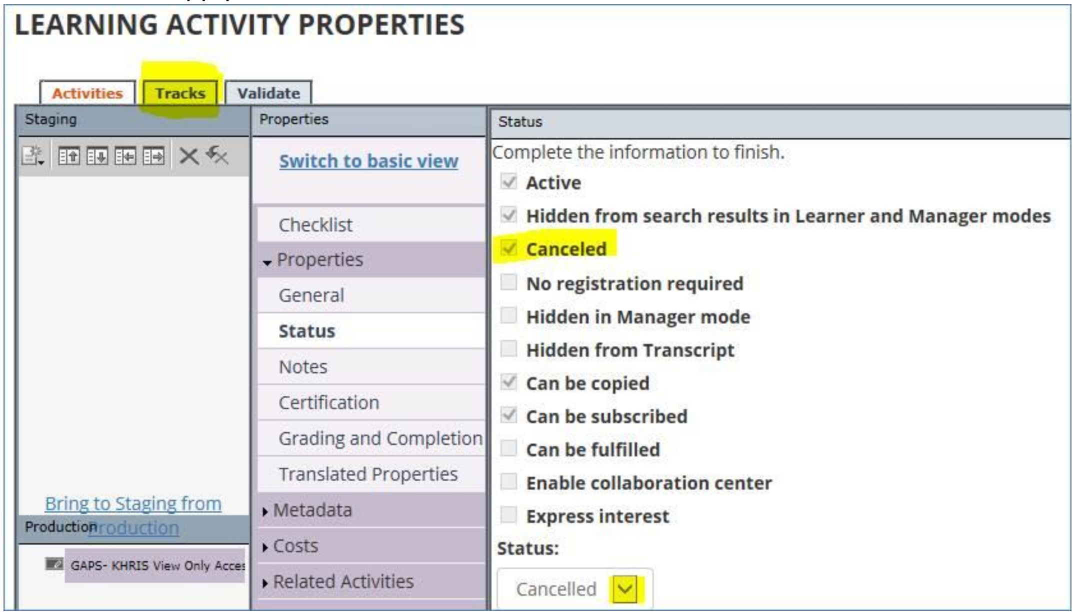
1. Hover over **Manager→Learn→Learning Activity Reports→Training Transcripts**

To stop emulating the learner

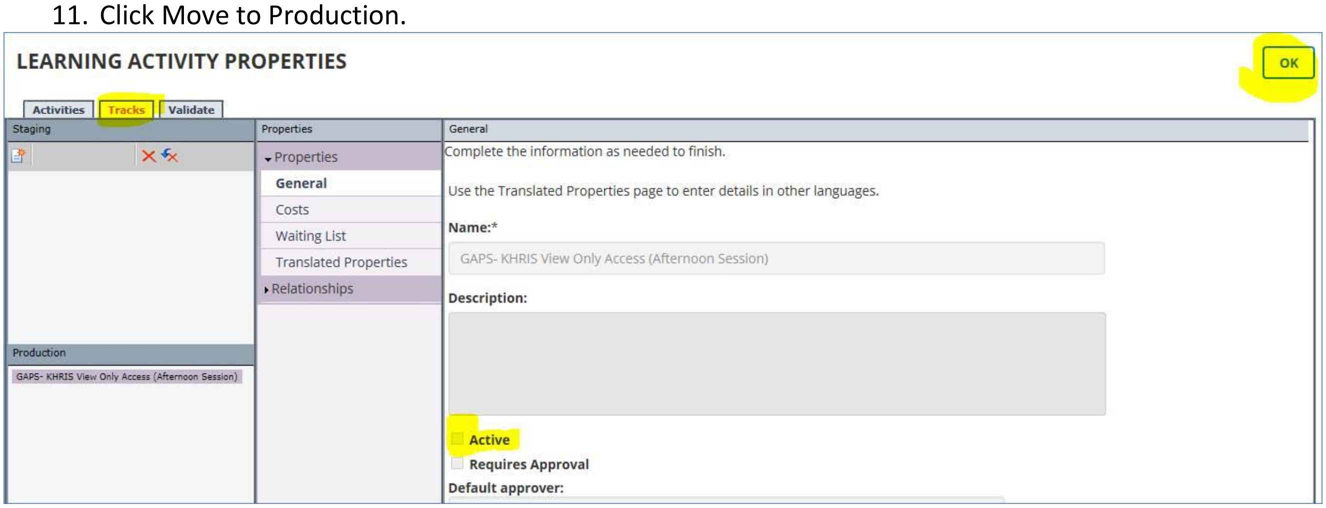
1. In the top right hand corner, locate your name (you will see the learners name beside yours) and click the drop down arrow
2. Click on SWITCH TO WORKGROUP VIEW

To Cancel A Class Offering:

1. Bring the activity back to STAGING.
2. Switch to Advanced View
3. Click on the General Properties
4. Click on Status
5. Place a check in the box that says Canceled, the status at the bottom will automatically change to Canceled.
6. Click Apply at the bottom.



7. Click on the Tracks Tab at the top and remove the check from the Active box. This will make the class inactive.
8. Click OK.
9. Click on the Activities Tab at the top.
10. Click Ready for Production
11. Click Move to Production.



A cancellation notice will go out to all participants informing them that the class has been cancelled.

This class cancellation will run in the nightly cycle and tomorrow morning the class cancellation will be reflected in the system.